TUTORIALS BY

# ZoomGrants: A How-To Guide for Applicants

Tips and Tools for Creating, Submitting, and Managing Your Applications

Need a printer-friendly version? https://zoomgrants.com/welcome/applicantslideshowpf.pdf Please consider sharing the link to this file instead of printing it. Using the link will ensure you have the latest version of this guide (and it'll save paper!).

Want to learn more? Go to <a href="https://zoomgrants.zendesk.com/hc/en-us">https://zoomgrants.zendesk.com/hc/en-us</a>

# 4 Quick Things to Know:

# **ZOOMGRANTS UNIVERSITY (ZGU)**

ZoomGrants users can access the knowledgebase for self-training and troubleshooting at any time by clicking the **HELP** link at the top of any application. Click the **ZoomGrants University button** to go to ZGU.

# THE AUTO-SAVE FEATURE

ZoomGrants<sup>™</sup> automatically saves your progress, so you can log out and log back in as many times as you need to in order to complete your Application. YOU DO NOT NEED TO COMPLETE YOUR APPLICATION IN ONE SITTING. Whenever you make a change in a field then click outside of that field or change your selection in a radio button, checkbox, or dropdown menu, you'll see a flash of the 'Saving' screen as your change is being saved. (Note: If you see the 'Saving' screen for more than a few seconds your Internet connection may have blinked during the saving process and the change may not have been saved. Read more on how to troubleshoot that issue on ZGU: https://zoomgrants.zendesk.com/.)

### THE TAB SYSTEM

**ZoomGrants™ predominantly uses a tab system** to set apart the different sections and features of the system. You can click on each tab to access the content housed there.

### THE CHECK FOR COMPLETION

ZoomGrants<sup>™</sup> will double-check your Application to ensure that it is complete before the Application is submitted. This means that every required question field in the Application as it appears online in your ZoomGrants<sup>™</sup> account must be completed, including any Document Requests that are marked as 'required'. (Note: If the system says that your Application is incomplete but you believe you have completed it, click the Refresh Page button on the ZoomGrants<sup>™</sup> page (not in your Internet browser) to check the Application again. Want to learn more? Go to https://zoomgrants.zendesk.com/

# About This Tutorial:

To provide instructions for creating, submitting, and managing your Applications while also giving a tour of the ZoomGrants<sup>™</sup> system, this tutorial uses two different colors to denote the different types of information provided.

# **ORANGE NUMBERS**

These are **sequential instructions** that can be followed by users who just want to know how to submit their Applications via ZoomGrants<sup>™</sup>.

# **BLUE/GREEN LETTERS**

These are **extra notes** regarding the ZoomGrants<sup>™</sup> system and its features.

ZOOMGRANTS

TUTORIALS BY

# PART ONE: Account Setup & Application Creation

Want to learn more? Go to <u>https://zoomgrants.zendesk.com/hc/en-us</u>.

# **GETTING STARTED**: Create Your Account

In order to submit an Application, you must have a ZoomGrants<sup>™</sup> account. You can use the same account to submit Applications to any other funder that uses ZoomGrants<sup>™</sup>.

Recipient accounts can *only* be created on the Funder's ZoomGrants<sup>™</sup> page (not the ZoomGrants<sup>™</sup> homepage). The Funder will provide a link or directions on its website.

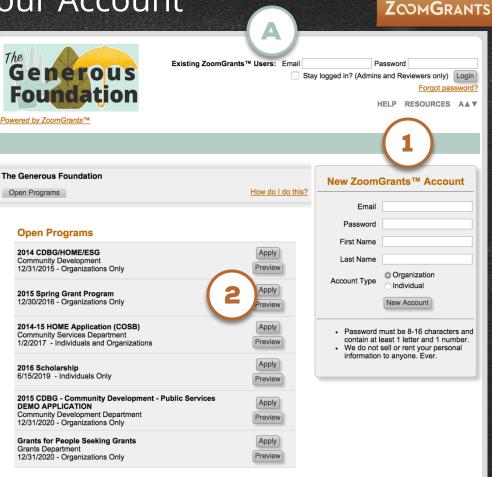
### **1. NEW ZOOMGRANTS™ ACCOUNT**

Use the New ZoomGrants<sup>™</sup> Account box to create your Account. Click the New Account button to create your account and log in automatically.

If you're already a ZoomGrants<sup>™</sup> user, log in using the fields in the upper right-hand corner (**A**).

### 2. APPLY

Click the Apply button next to the appropriate Program in the Open Programs section to create your Application. You can create additional Applications later.



TUTORIALS BY

# PART TWO: Application Completion & Submittal

Want to learn more? Go to <u>https://zoomgrants.zendesk.com/hc/en-us</u>.

# THE APPLICATION: A Quick Tour

2

# **1. CONTACT ADMIN**

Click here to send an email to the Program Administrator.

ZoomGrants<sup>™</sup> Technical Support staff can help with technical questions or general inquiries about the system, but all content-related questions should be directed toward the official contact for that Program

# 2. OPEN PROGRAMS

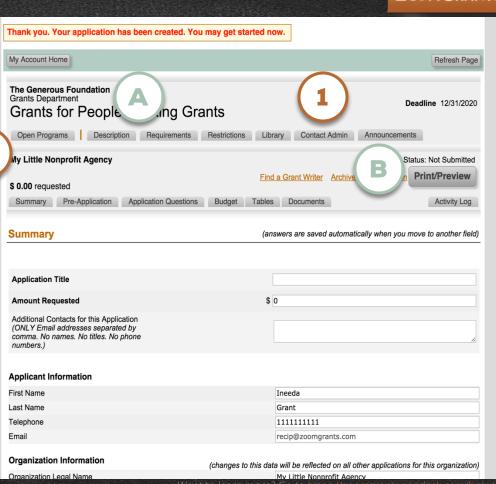
Click here to create additional Applications for this Program or to create new Applications for other Programs offered by this Funder.

### **A. PROGRAM INFORMATION TABS**

If the Funder chooses to use them, these tabs contain program information. They may be set to automatically open as soon as you log in. Click the orange [hide this] link to hide the text when the tab is open.

### **B. PRINT/PREVIEW**

Click here to view a printer-friendly version of your Application. You can print the Application, save it as a PDF, or email it as an attachment from the Print/Preview window.



# **APPLICATION TABS**: Summary\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY ZOOMGRANTS

# **1. SUMMARY\* TAB**

Enter your contact information, the contact information for your organization (if applicable), and general Application information – title, amount requested, etc. – in this first tab of the Application.

### **REMEMBER:**

- The system will save automatically as you move between the fields.
- You must fill out every required field in order to be able to submit the full Application.

My Account Home	Refresh Pa
The Generous Foundation Grants Department Grants for People Seeking	Grants Deadline 12/31/20
Open Programs Description Requirement	ents Restrictions Library Contact Admin Announcements
onprofit Agency	Application Status: Not Submitte
1)	Find a Grant Writer Archive this Application Print/Preview
summary Pre-Application Application Que	estions Budget Tables Documents Activity Log
Application Title	\$ 0
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No fames. No titles. No phone	
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.)	(answers are saved automatically when you move to another fre
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.)	
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.) Applicant Information	\$ 0
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.) Applicant Information Girst Name ast Name	\$ 0
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.) Applicant Information First Name Last Name Telephone	\$ 0
Application Title Amount Requested Additional Contacts for this Application (ONLY Email addresses separated by comma. No names. No titles. No phone numbers.) Applicant Information First Name	\$ 0

# **APPLICATION TABS:** Pre-Application\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS B

# 1. PRE-APPLICATION\* TAB

Some Funders use a Pre-Application to vet Applicants. If there is a Pre-Application and you see the red message that appears in the screenshot to the right, you must fill out this tab and submit it for review.

*Only* if your Pre-Application is Approved can you continue with the rest of the Application. You will receive an email notification when a decision is made.

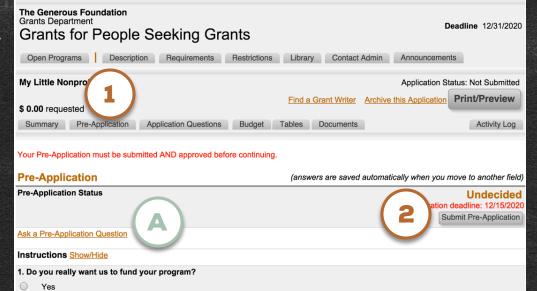
# 2. SUBMIT PRE-APPLICATION\*

When you're finished answering the questions in the Pre-Application, click the Submit button.

When the Pre-Application has been successfully submitted, a timestamp of the submittal time will appear in lieu of the Submit button. Refresh the page using the gray Refresh Page button near the top of the page to confirm the timestamp.

# A. ASK A PRE-APPLICATION\* QUESTION

If you have questions regarding the Pre-Application\* content or the status of your submittal, use the Ask a Pre-Application Question link to send an email to the Program Administrator.



No
 Kind of, explain:
 2. Choose up to 3 (three) adjectives to describe your program.
 Our project will be...
 Fun
 Helpful

- Socially-Responsible
- Awesome

Totally Cool

3. Briefly (less than 3 paragraphs) describe the program for which you are requesting funding. Use of alliteration and onomatopoeia is highly commended.

# **APPLICATION TABS:** Questions\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY

# **1. APPLICATION QUESTIONS\* TAB**

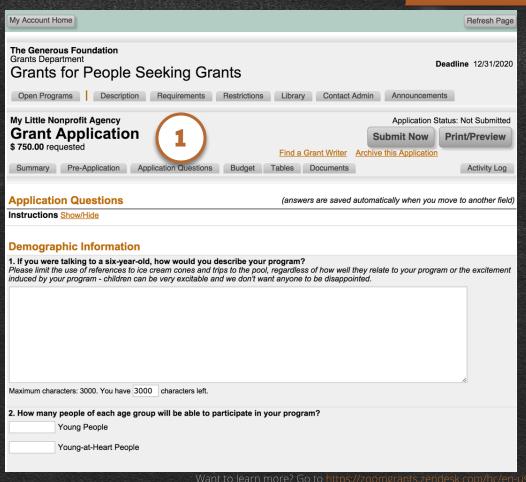
Most funders put the bulk of their Application content here. Be sure to fill every field that appears in this tab in the live, online version of your Application.

### A NOTE RE: BRANCHING QUESTIONS

### Some funders use one of the multiple choice questions in the Application Questions\* and/or Pre-Application\* tabs as a Branching Question.

Based on your selection on the Branching Question, you'll see a specific set of pre-determined questions. Make your selection on the Branching Question, then give the page a moment to fully reload. Some questions may appear or disappear, based on your answer.

The Print/Preview view shows *all* of the Application content, though you may not be responsible for every field. So long as you have filled out everything that appears in the <u>live</u> version of your Application in your ZoomGrants<sup>™</sup> account (<u>not</u> the Print/Preview), you will be able to submit. Remember that the system automatically checks to make sure you completed every required component. If you accidentally miss anything, it will tell you.



# **APPLICATION TABS**: Budget\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY ZOOMGRANTS

# 1. BUDGET\* TAB

Funders may request budget information in this tab.

### A. TOTALS

In this tab, totals are calculated automatically. There may also be extra calculated columns set up by the Administrator.

#### You do not need to fill every field in this tab.

My Account Home	Refresh Page
The Generous Foundation Grants Department Grants for People Seeking Grants	Deadline 12/31/2020
Open Programs Description Requirements Restrictions Library Contact Admin Announcement	ts
My Little Nonprofit Agency Grant Application \$ 750.00 requested Application Find a Grant Writer Archive this Application	
Summary Pre-Application Application Questions Budget Tables Documents	Activity Log

#### Budget Instructions Show/Hide

(answers are saved automatically when you move to another field)

#### Program Revenue Sources

For the Revenue Section, please only include revenues specific to the program for which you are requesting funding.

Item Description	Total Projected	Already Received
City funds (committed)	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
		\$
	Total \$ 0.00	Total \$ 0.00

#### Program Expenses

For the Expenses Section, please only include expenses specific to the project for which you are submitting this application.

# **APPLICATION TABS**: Tables\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY ZOOMGRANTS

# 1. TABLES\* TAB

#### This tab captures uniquely-formatted data.

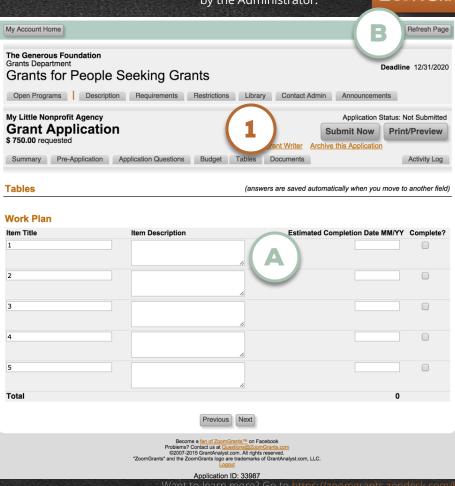
You do not need to fill every field in this tab.

# A. RESIZABLE FIELDS

Depending on which Internet browser you are using (ZoomGrants™ recommends Chrome), you may be able to resize the larger text boxes. Click and drag in the corner to make the box larger or smaller.

# **B. REFRESH TO UPDATE TOTALS**

Values for Subtotals, Totals, and Calculated columns can be updated by clicking the Refresh Page button.



# **APPLICATION TABS**: Documents\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY ZOOMGRANTS

# 1. DOCUMENTS\* TAB

Provide a link to or directly upload the requested Documents in this tab.

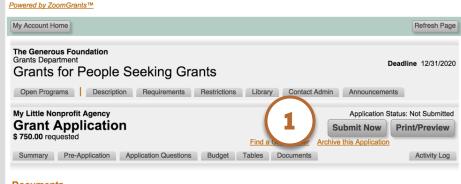
### 2. UPLOAD

Click this button to open the File Upload Window, where you can provide a link to your files or upload the files to attach to your Application.

Check out this video for more specific instructions: <u>How to Upload</u> <u>Files</u>

# A. REQUIRED DOCUMENTS

For Document Requests that are marked 'required', you must upload or link something in that slot in order to satisfy the system and submit the Application.



#### Documents

Instructions Show/Hide

All document attachments must be included digitally. We will not accept hard copies. (Please remember the environment...)

If you have digital copies of these documents, please upload them here. If not, scan your original documents and upload them. If you are having difficulty digitizing your documents, call our office and we can help you with this.

Documents Requested *	Required?	Uploaded Documents *	$\frown$
Program Brochure/Promotional Materials		-none-	Upload
Letter of Support 1	required	-none-	Upload
Letter of Support 2	required	-none-	Upload
Letter of Support 3		-none-	Upload

\* ZoomGrants™ is not responsible for the content of uploaded documents.

Previous

Become a fan of ZoomGrants<sup>114</sup> on Facebook Problems? Contact us at <u>Queetions@ZoomGrants.com</u> @2007-2015 GrantAnalyst.com. All rights reserved. "ZoomGrants" and the ZoomGrants logo are trademarks of GrantAnalyst.com, LLC

Application ID: 33987

# SUBMITTING YOUR APPLICATION

### **1. SUBMIT NOW**

When you're ready to submit your Application, click the Submit Now button.

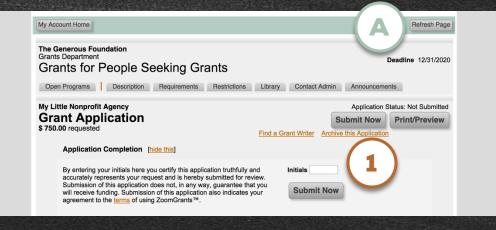
If there are any fields that are incomplete, the system will display those fields in red. Fill in those fields, then click the Refresh Page button (**A**) and try the Submit Now button again.

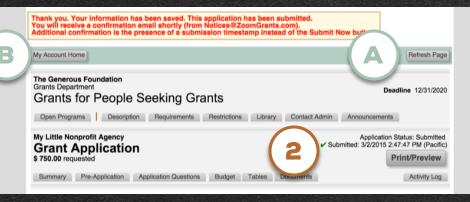
If your Application is complete, an Initials box will appear. Enter your initials, then click the lower Submit Now button.

### 2. SUBMITTED

To verify that your Application was submitted successfully, check for the Submitted timestamp. You can use the Refresh Page button (**A**) to triple-check the presence of the timestamp.

You can also verify that your Application was submitted by clicking the My Account Home button (**B**) then clicking into the Submitted tab. If your Application is there, it was submitted successfully. Additionally, you will receive a confirmation email.





### TUTORIALS BY ZOOMGRANTS

Want to learn more? Go to https://zoomgrants.zendesk.com/hc/en-us.

# WORKING ON YOUR APPLICATIONS

After you've started your Application, you can log in directly on the ZoomGrants<sup>™</sup> homepage – <u>https://ZoomGrants.com</u> - whenever you need to work on your Application (rather than going through the Funder's website).

# **1. MY ACCOUNT HOME**

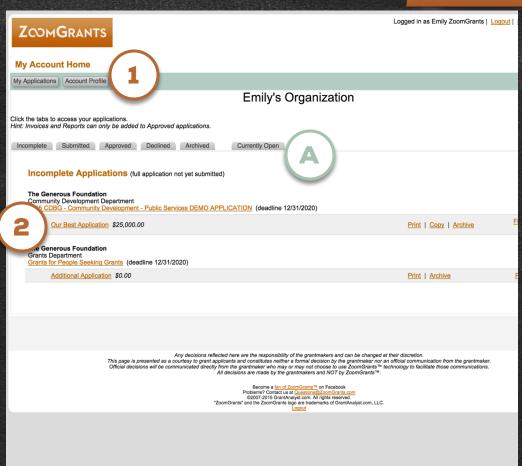
When you log in from ZoomGrants.com, you'll start at your My Account Home page. From here, you can access all of your Applications by clicking on the tabs.

### **2. INCOMPLETE APPLICATIONS**

To continue working on an Application, click the orange Application title.

### A. CURRENTLY OPEN

To view a list of all of the Open Programs from every Funder to which you've submitted an Application in the past, click here.



# So you submitted your Application and were chosen to receive funding.

**Congratulations!** 

... Now what?

# PART THREE: Managing Post-Funding Activities

Want to learn more? Go to https://zoomgrants.zendesk.com/hc/en-us.

# **POST-FUNDING:** Accessing Applications by the Administrator.

\*This feature may have a different



(Remember that once you've started your Application you can log in directly on the ZoomGrants<sup>™</sup> homepage https://ZoomGrants.com.)

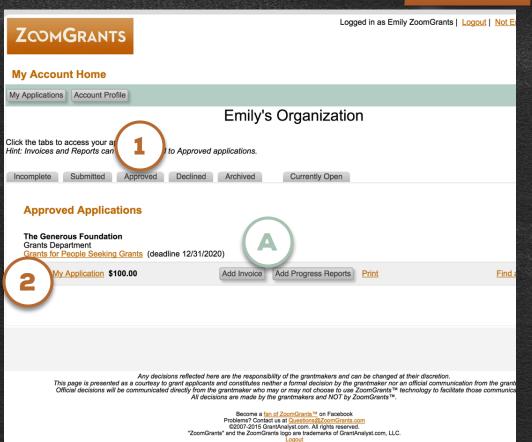
# **1. APPROVED TAB**

Click into the Approved tab to view all of your Approved Applications. Depending on the Funder's settings, you can submit Invoices\* or Post-Funding Reports\*, sign Contracts\*, and more.

# A. EASY ACCESS BUTTONS

You can click either of these buttons to quickly create a new Invoice\* or navigate to the Reporting\* section of an Application.

To view the entire Application and the Post-Funding\* tabs, click the orange Application title  $(\mathbf{2})$ .



# **POST-FUNDING:** Contracts\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY

### **1. CONTRACT\* TAB**

(A).

You may be asked to review and sign a Contract\* in this tab. Add your signature in the Signatures section. If any amending documents are uploaded, you will also be asked to enter your signature for each document

My Account Home **Refresh Page** The Generous Foundation Grants Department Deadline 12/31/2020 Grants for People Seeking Grants **Open Programs** Description Requirements Restrictions Library Contact Admin Announcements Emily's Organization Application Status: Approved \$ 100.00 My Application Application Status: Signed Contract Received Submitted: 9/29/2014 11:20:13 AM (Pacific) \$ 100.00 **Print/Preview** Summ oplication Application Questions Budget Tables Documents Activity Log **Funding Contract** Financial Progress Reports **Progress Reports Totals** Funding Contract Instructions show/hide Hello Emily's Organization, This is a Contract By signing this Contract, you agree that this is a Contract. Do you agree that this is a Contract? If so, please sign. If not, please see line 1. Documents **Emily's Organization** The Generous Foundation Amendment I Sign here to accept Upload Funding Contract Documents Signatures

# **POST-FUNDING:** Financial\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS B

# **1. FINANCIAL\* TAB**

If the Funder chooses to use ZoomGrants™ to manage Invoices\* and Payments\*, you can submit Invoices\* and view Payments\* in the Financial\* tab.

Check out this video for more specific instructions: http://youtu.be/GixSnU4QhdQ.

### 2. EDIT AN INVOICE\*

Click an orange Invoice\* number to open that Invoice\*. If its status is Not Submitted, you can edit then submit it.

### **3. CREATE A NEW INVOICE\***

**Click this button to start a new Invoice.** (This is the same as the easy access Create Invoice\* button in your My Account Home page.)



#### Financial

(click on column headers to sort on that column) Ask a Financial Question

Number	Date Submitte	d Status	Requested A	mount Ap	proved Amount	Tota
1	10/3/2014	Paid		\$ 10.00	\$ 10.00	\$ 10.00
<u>3</u>	[delete]	Not Submitted		\$ 7.00		
4	10/3/2014	Approved		\$ 50.00	\$ 50.00	
<u>5</u>	10/1/2014	Declined		\$ 2.00	\$ 0.00	
Z	10/1/2014	Pending		\$ 3.00		
Create a New	)	Total	ŝ	\$ 72.00	\$ 60.00	\$ 10.0
Date	Number D	escription	Status		Deposit	Balanc
	A	Official ward mount			\$ 100.00	\$ 100.0
9/29/2014	1	1	Paid	\$ 10.00		\$ 90.0
9/29/2014		econd ayment	Paid	\$ 10.00		\$ 80.0
9/30/2014			Pending	\$ 50.00		

Pending Total

\$ 70.00

\$ 100.00

\$ 80.00

# **POST-FUNDING**: Reports\*

\*This feature may have a different label, depending on the settings chosen by the Administrator.

# TUTORIALS BY ZOOMGRANTS

# **1. REPORTS\* TAB**

Some Funders require funding recipients to submit Post-Funding Reports\*. Click into this tab to fill out and submit those Reports\*.

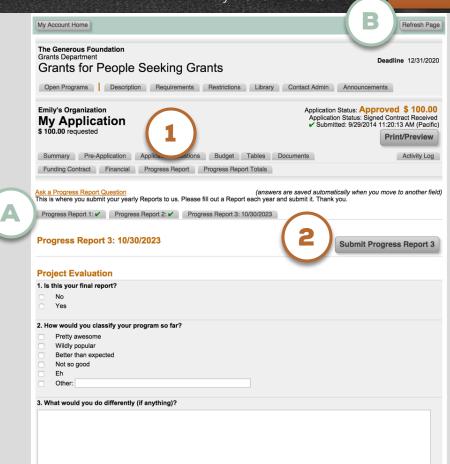
### 2. SUBMIT REPORT\*

When you're done working on your Report, click the button to submit it. The system will check to make sure you completed every field presented in the live, online version. Use the Refresh Page button (**B**) to verify that your Report\* was submitted.

ZoomGrants<sup>™</sup> recommends that you use an up-to-date version of Internet Explorer, Chrome, Safari, or Firefox to submit your Reports\*.

### A. REPORT\* TABS

Each Report\* is housed in its own tab. Deadline dates are displayed for Reports\* that have not yet been submitted and are not yet due. Overdue Reports\* are denoted in red. Submitted Reports\* are marked with green check marks.



TUTORIALS BY

# PART FOUR: Additional Instructions

Want to learn more? Go to <a href="https://zoomgrants.zendesk.com/hc/en-us">https://zoomgrants.zendesk.com/hc/en-us</a>.

### tutorials by

# **DELETE APPLICATIONS**

In order to keep Applications from being accidentally deleted, the removal process requires several steps.

# FROM MY ACCOUNT HOME:

### **1. ARCHIVE APPLICATION**

Click the orange Archive link next to an Application to send that Application to the Archived tab.

### 2. ARCHIVED TAB

Click into the Archived tab to delete the Application.

### FROM A FUNDER'S OPEN PROGRAMS LIST:

### **1. ARCHIVE APPLICATION**

Click the orange Archive link next to an Application to send that Application to the Archived tab.

### 2. MY ACCOUNT HOME

Click the My Account Home button to access the Archived tab.

My Applications Account Profile		
Click the tabs to access your applications. Hint: Invoices and Reports can only be added to Approve		
Incomplete Submitted Approved Declined Archived Currently Open		
Incomplete Applications (full application not yet submitted) The Generous Foundation Community Development Department	(1)	
2015 CDBG - Community Development - Public Services DEMO APPLICATION (deadline 12/31/2020)		
Our Best Application \$25,000.00	Print   Copy   Archive	Find a Grant Writer Casey Consultant
The Generous Foundation Grants Department <u>Grants for People Seeking Grants</u> (deadline 12/31/2020)		
Additional Application \$0.00	Print   Archive	Find a Grant Writer
Open Programs		
2014 CDBG/HOME/ESG Community Development 12/31/2015 - Organizations Only	Apply	iew
2015 Spring Grant Program 12/30/2016 - Organizations Only	Apply	iew
2014-15 HOME Application (COSB) Community Services Department 1/2/2017 - Individuals and Organizations	Apply	iew
2016 Scholarship 6/15/2019 - Individuals Only	Apply Prev	iew
2015 CDBG - Community Development - Public Services DEMO APPLICATION Community Development Department 12/31/2020 - Organizations Only Archive Our Best Application	Apply Again F	review

# Tips from the ZoomGrants<sup>™</sup> Team:

# START EARLY. FINISH EARLY. SUBMIT EARLY.

Putting off starting, finishing, or submitting your Application does nothing but cause stress. Don't do that to yourself.

Start your Application as soon as the Program opens. Get familiar with the requirements and gather your materials. Save a copy of the Print/Preview to look over when you're not online. Work on the Application throughout the submittal period, giving each section the attention it deserves. And **submit early**.

# **REACH OUT ANY TIME YOU NEED HELP**

#### When in doubt, ask someone.

Use the Contact Admin tab and Ask a Question links in the Application in your ZoomGrants<sup>™</sup> account to get in touch with the Program Administrator if you have questions about Program requirements or content. Look over ZGU if you have technical questions. If you can't find the answers you need on ZGU, contact the ZoomGrants<sup>™</sup> office if you have questions about the system or if you need technical assistance. The Tech Support Team loves helping Applicants.

TUTORIALS BY ZOOMGRANTS

# TECHNICAL QUESTIONS?

# We're always happy to help.

Visit ZGU: https://zoomgrants.zendesk.com/hc/en-us/

Email tech support: <a href="https://zoomgrants.zendesk.com/hc/en-us/requests/new">https://zoomgrants.zendesk.com/hc/en-us/requests/new</a>

Give us a call: (866) 323-5404 x2

Last Updated: 4/19/17

Want to learn more? Go to <a href="https://zoomgrants.zendesk.com/hc/en-us">https://zoomgrants.zendesk.com/hc/en-us</a>.